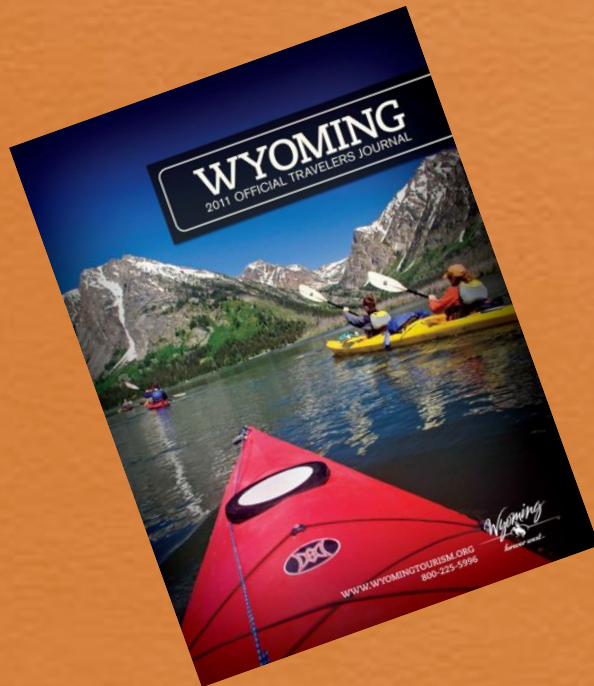


Miles-Weaver

Wyoming Official Travelers Journal

2011 Usage Research



November 2011

Conducted by:

A.J. Lerner Market Research

Boulder, Colorado

Web design/tabulation by

HardwareMonkey/Surveybooth.com

Table of Contents

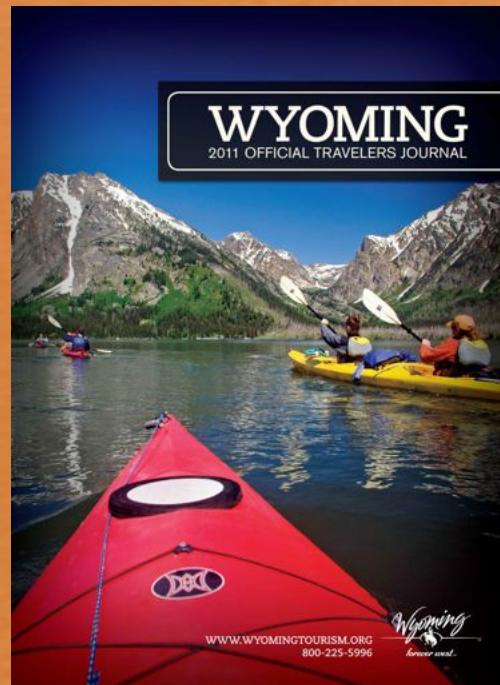
Methodology	page 3
Obtaining the Journal and Visiting the Wyoming	page 5
Planning Wyoming Visit	page 11
About the Visit	page 18
Using the Journal	page 24
Outdoor Recreation Activities	page 31
Entertainment and Cultural Attractions	page 35
Dining	page 39
Shopping	page 43
Lodging	page 47
Use of Other Information Sources	page 51
Demographics	page 57
Addendum	page 66

Methodology

Methodology

- ◆ This research was designed and conducted by A.J. Lerner Market Research, Inc., an independent market research firm in Boulder, Colorado. Web design and tabulation were prepared by HardwareMonkey, with online survey by Surveybooth.com.
- ◆ Miles-Weaver supplied researchers with e-mail addresses from WyomingTourism.org.
 - 42,896 e-mails were sent to addressees on October 24, 2011 and again on November 2, 2011 inviting them to participate in an on-line survey
 - Responses were tallied on November 14, 2011
- ◆ The response rate is 8.8%; 3,765 of those contacted clicked onto the web survey.
- ◆ A total of 1,972 respondents completed the entire survey, providing the overall maximum margin of error of +/- 2.2%.
- ◆ Unless otherwise noted, the number of respondents for each question is 1,972.

Obtaining the Journal and Deciding to Visit



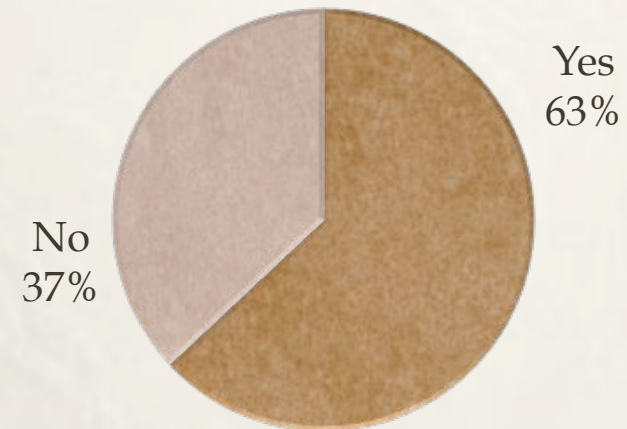
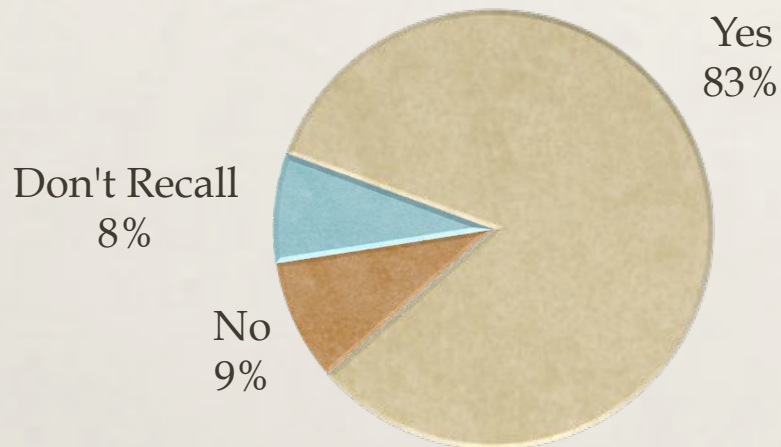
Highlights: Obtaining the Journal and Deciding to Visit

- ◆ Most (83%) travelers say they have a copy of the Wyoming Official Travelers Journal.
 - 63% of those who have received a Journal say they have visited Wyoming
- ◆ For 71%, this is the first time obtaining the Guide.
- ◆ The majority (90%) request the Wyoming Official Travelers Journal via the WyomingTourism.org website.
- ◆ Over half (53%) visit within 60 days of receiving the Journal.
- ◆ Two-thirds (67%) say the Journal influences their decision to visit Wyoming.

Obtaining the Journal & Visiting

Do you recall receiving a copy of the 2011 Wyoming Official Travelers Journal? *

Since receiving the 2011 Wyoming Official Travelers Journal have you visited Wyoming? **



NOTE: Information about those who did not receive the Journal or visit Wyoming can be found in the Addendum

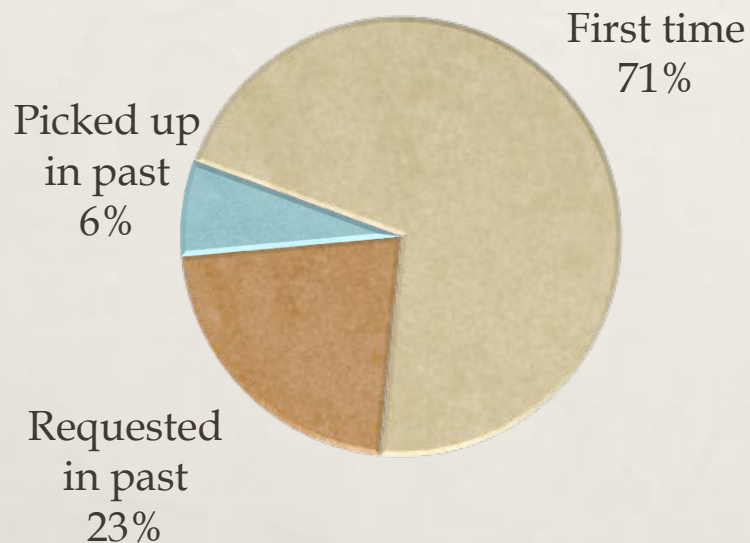
* Asked of all respondents (n = 3,765)

** Asked of all respondents who replied 'yes' to the question "Do you recall receiving a copy of the 2011 Wyoming Official Travelers Journal?" (n=3,115) 7

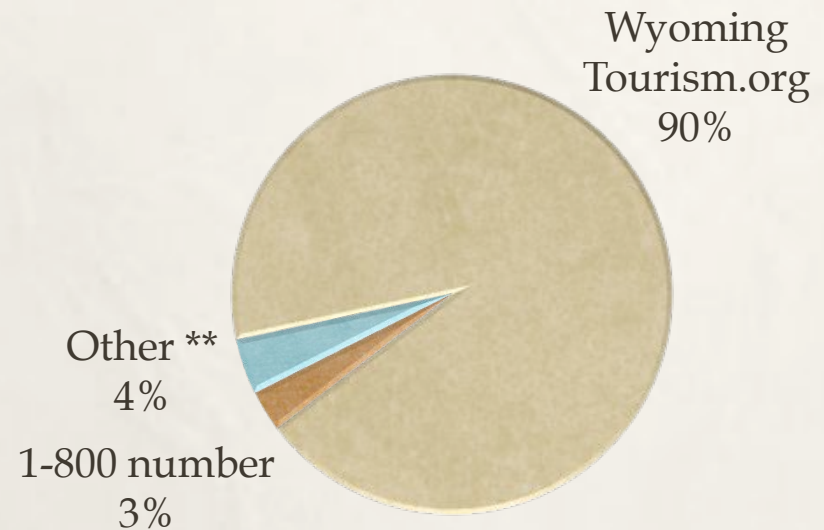
Miles-Weaver Wyoming 2011 OSVG Research
Conducted by A.J. Lerner Market Research

Past Use of the Journal

Not including the 2011 Wyoming Official Travelers Journal you received this year, have you requested or used a Wyoming OTJ in previous years?



How did you request the Wyoming Official Travelers Journal?

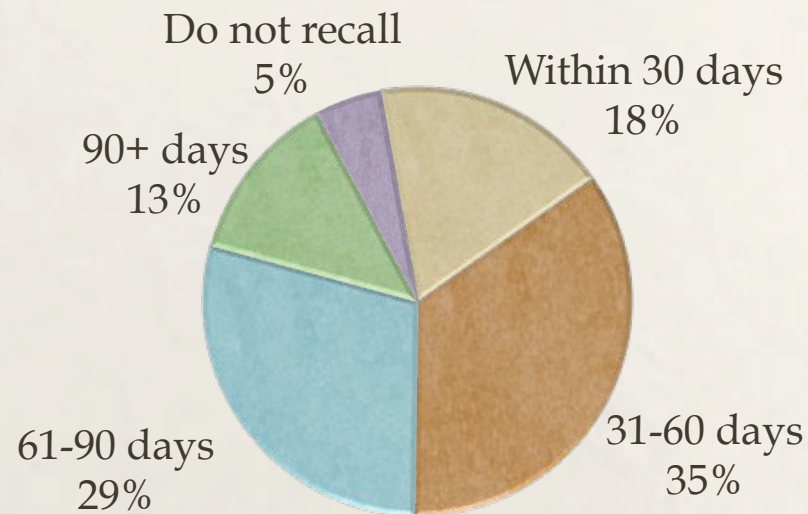


* Asked of all respondents who replied 'yes' to the question "Do you recall receiving a copy of the 2011 Wyoming Official Travelers Journal?" (n=4,648)

** 'Other' information can be found in the supplement

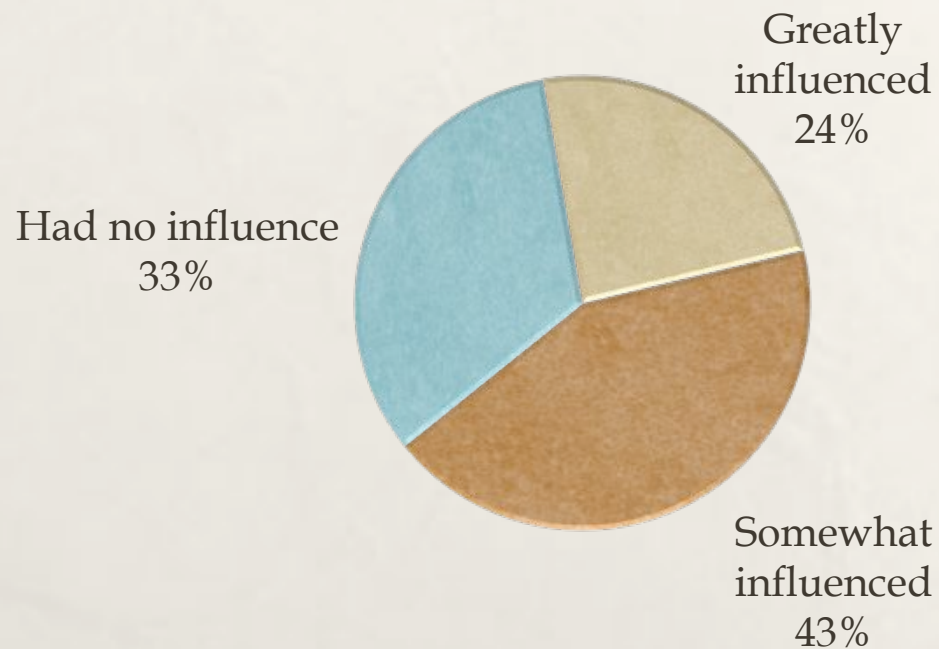
Requesting the Journal

How long after receiving your Wyoming Official Travelers Journal did you visit Wyoming?



Journal's Influence

How do you think the OTJ influenced your decision to visit Wyoming?



Planning Wyoming Visit

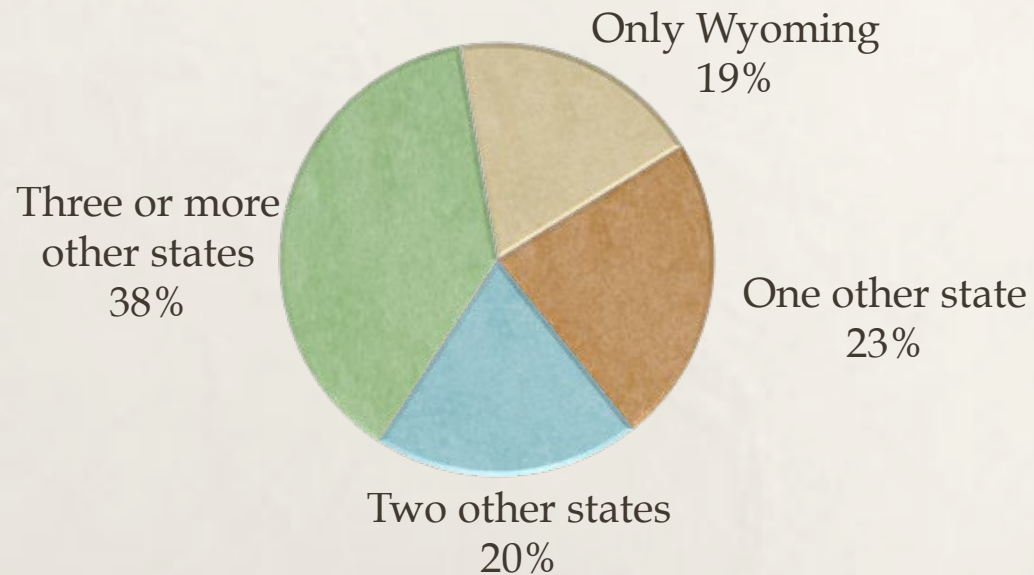


Highlights: Planning Wyoming Visit

- ◆ 79% of Wyoming visitors consider traveling to states other than Wyoming.
- ◆ Most (71%) plan their trip using the Journal and the website in combination.
- ◆ The primary reasons they want the print Journal (in addition to using the website) are:
 - To bring on vacation (80%)
 - To have maps for reference (71%)
 - To get printed information for later reference (61%)
- ◆ Most (85%) find the WyomingTourism.org website using a search engine.
- ◆ Visitors would like to see more information on the WyomingTourism.org website about:
 - National Parks (65%)
 - Town Information (51%)
 - Museums & Other Historic Sites (48%)
 - Lodging (42%)

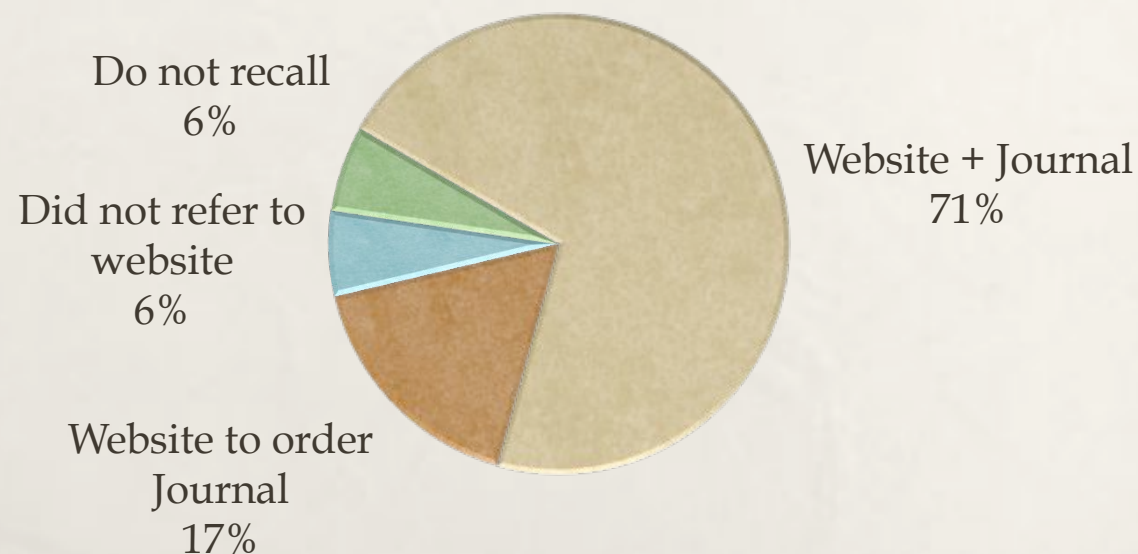
Visiting Wyoming

Was Wyoming the only location you considered or did you consider traveling to any other states?



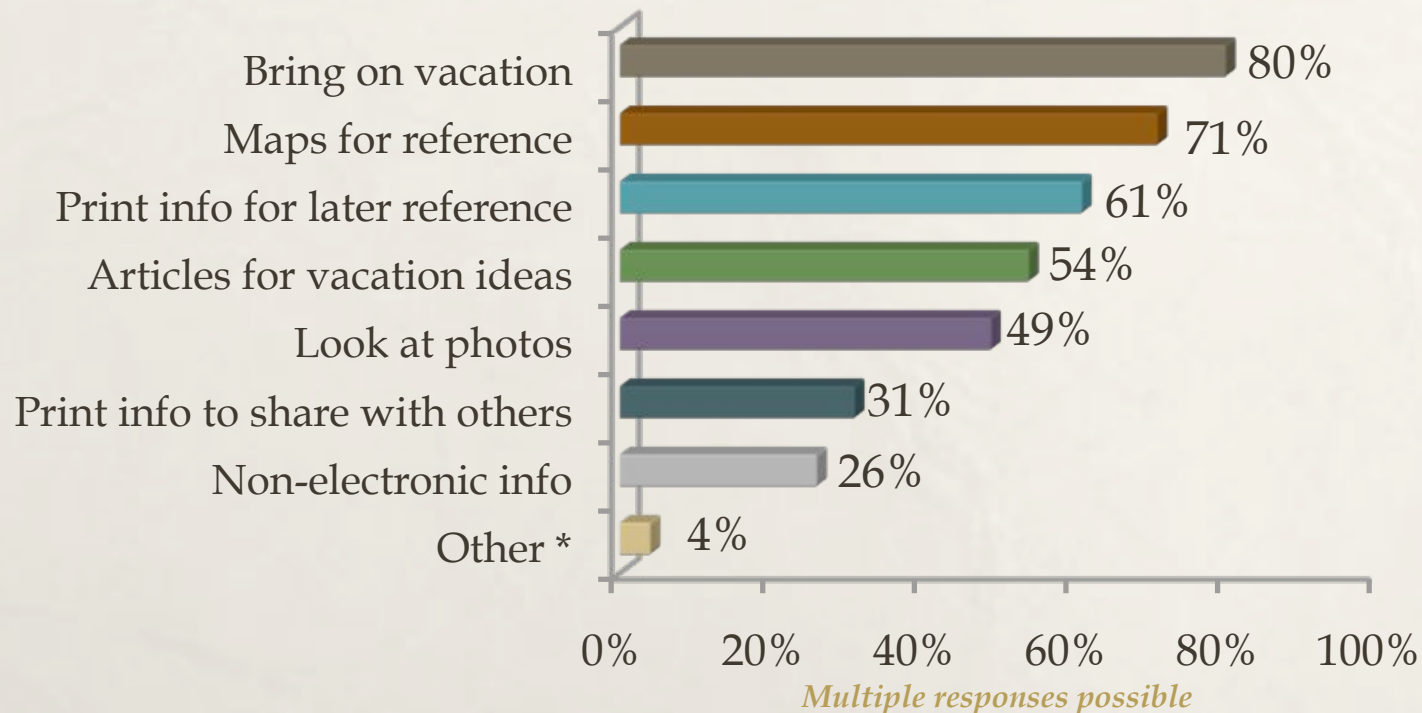
Journal and Website Use

Which of the following best describes how you planned your most recent visit to Wyoming?



Use of Website in addition to Journal

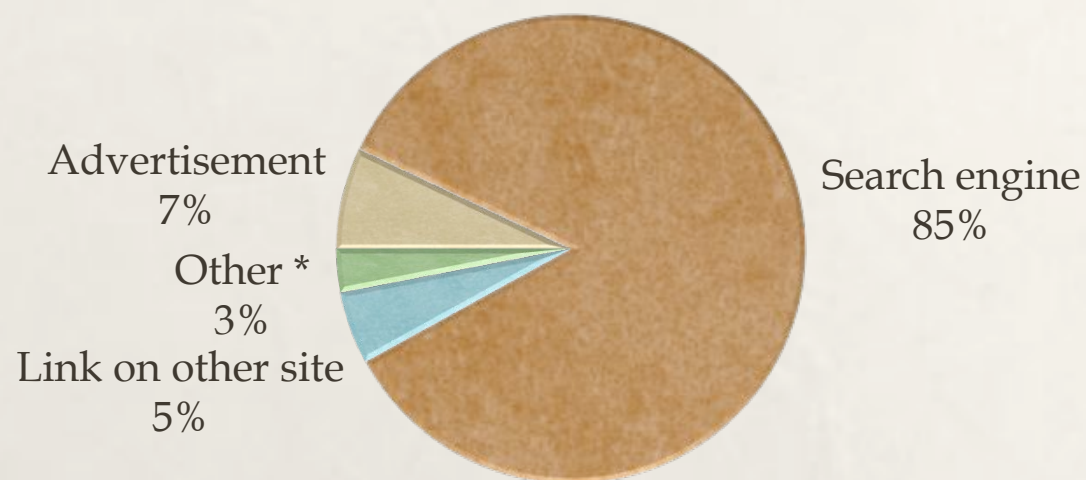
You mentioned that you used the Wyoming Tourism website and you also requested a copy of the Wyoming OTJ. Why did you want a printed Journal in addition to website information?



* Other information can be found in the Supplement.

Finding the Website

How did you find the
WyomingTourism.org website? *



* Other information can be found in the Supplement.

WyomingTourism.org Website

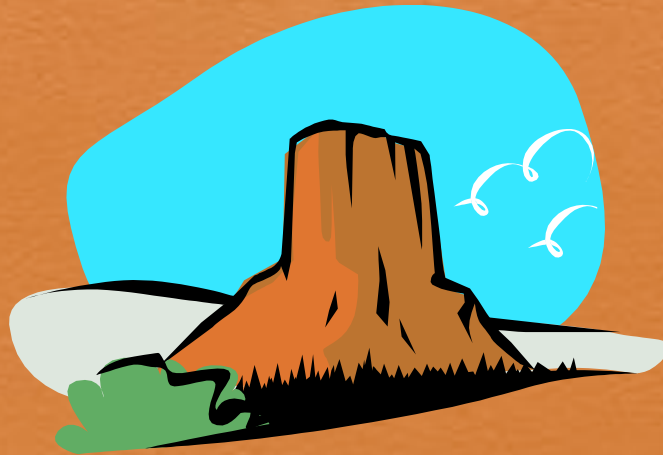
About which topics would you like to see more information on the WyomingTourism.org website?

65%	National Parks
51%	Town Information
48%	Museums & Other Historic Sites
42%	Lodging
38%	Restaurants
32%	Events
28%	Camping & RV Parks
25%	Hiking
23%	Other Outdoor Activities
*	Other

Multiple responses possible

* Other includes dude ranches, guides and outfitters, fishing, skiing, snowmobiling

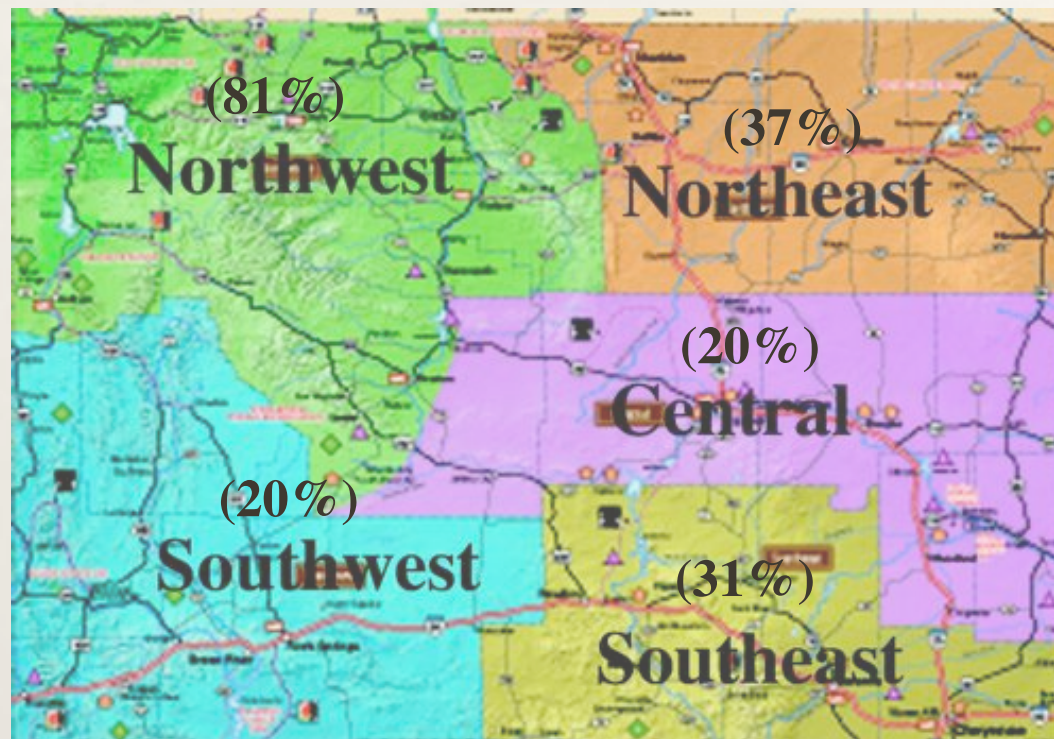
About the Visit



Highlights: About the Visit

- ◆ Most (81%) travel to the northwest region of Wyoming (Yellowstone, Grand Tetons, Jackson, Big Horn Canyon, Cody, Thermopolis).
 - 37% travel to the northeast (Devils Tower, Sheridan, Gillette, Newcastle)
 - 31% travel to the southeast (Cheyenne, Laramie, Saratoga, Rawlins)
- ◆ Visitors spend an average of 5.5 nights in Wyoming, mostly in the northwest region.
 - 58% use the Journal to make decisions about accommodations; 70% use listings, 45% see an ad and 29% read an article
- ◆ Over two-thirds (68%) arrive by car, 14% fly and 12% drive an RV to Wyoming.
 - Almost a-third (32%) rent a car or an RV while in Wyoming
- ◆ 55% spend over \$1,000 (excluding airfare and gasoline) during their visit to Wyoming.

Where Traveled to in Wyoming



NOTE: Multiple responses possible

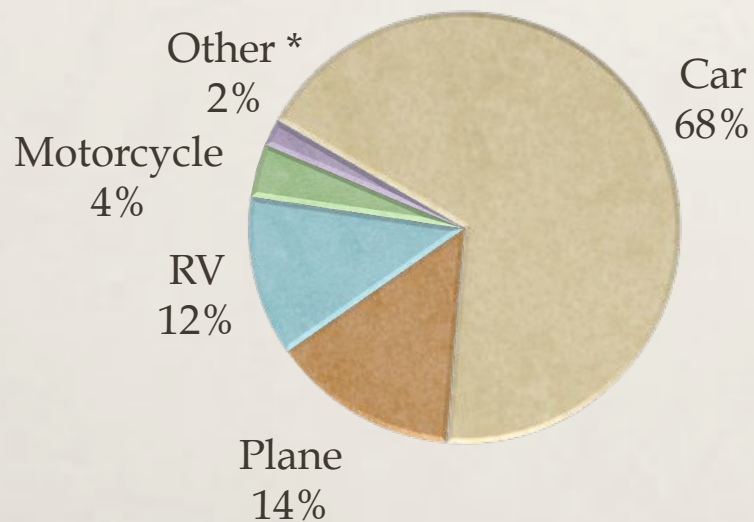
Overnights in Wyoming Regions

During your most recent visit to Wyoming, how many overnights did you spend in these Wyoming regions?

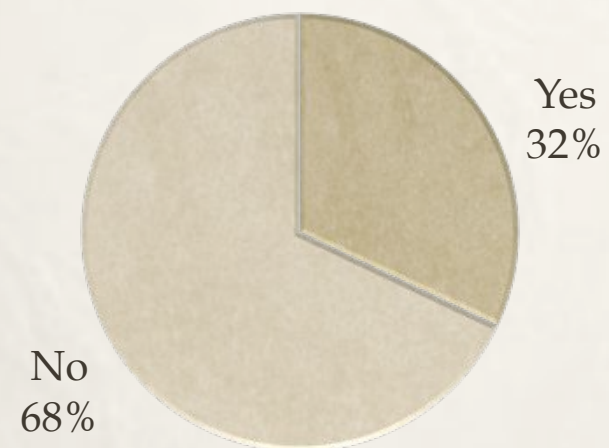
Region	Average Nights Spent
Northwest	3.6
Northeast	0.6
Southeast	0.6
Central	0.4
Southwest	0.3
Total (average) nights	5.5

Transportation

During your most recent Wyoming visit, did you arrive by ...?



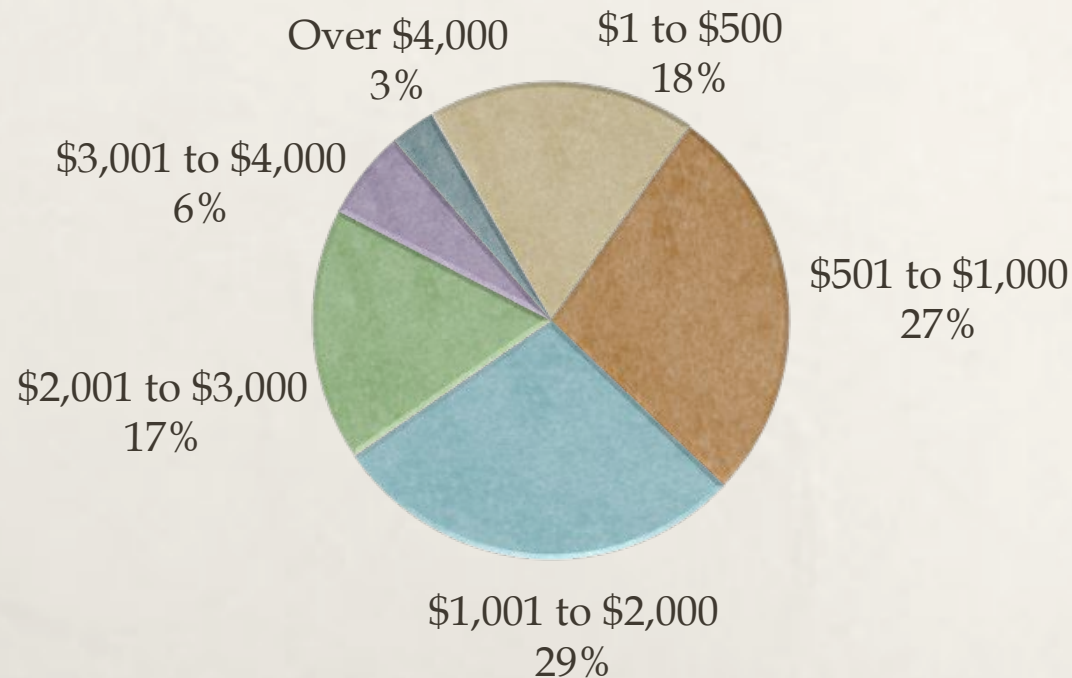
Did you rent a car or RV in Wyoming?



* Other = bus, train, camper, pick-up, SUV, truck, van

Spending on Last Visit

Excluding airfare and gasoline, approximately how much did you spend on your last visit to Wyoming?



Using the Journal

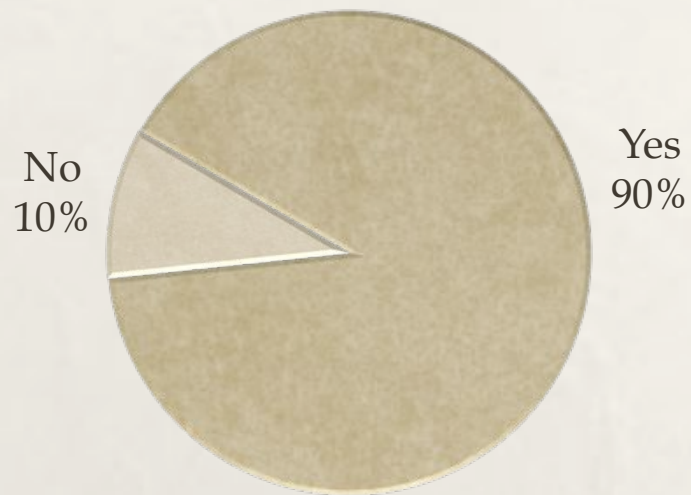


Highlights: Using the Journal

- ◆ The vast majority (90%) bring the Wyoming Official Travelers Journal with them when they travel to Wyoming.
- ◆ The Journal is generally used by multiple people; 78% of travelers share the Journal among two or more people.
- ◆ All aspects of the Journal are seen as useful by the vast majority of travelers:
 - 99% find the maps useful
 - 96% find the editorial useful
 - 95% find the listings useful
 - 92% find the ads useful.
- ◆ The Journal influences travelers to:
 - Make changes to their trip route (42%)
 - Decide to plan a return visit to Wyoming (34%)
 - Extend time in a particular location (26%)
 - Extend their Wyoming visit (20%)

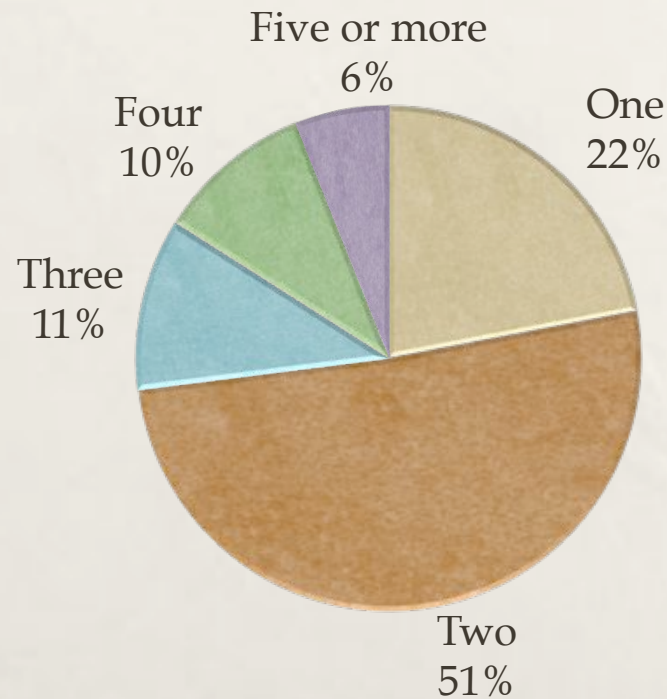
Bringing the Journal Along

Did you bring the Wyoming Official Travelers Journal with you when you traveled to Wyoming?



Number of People Using Journal

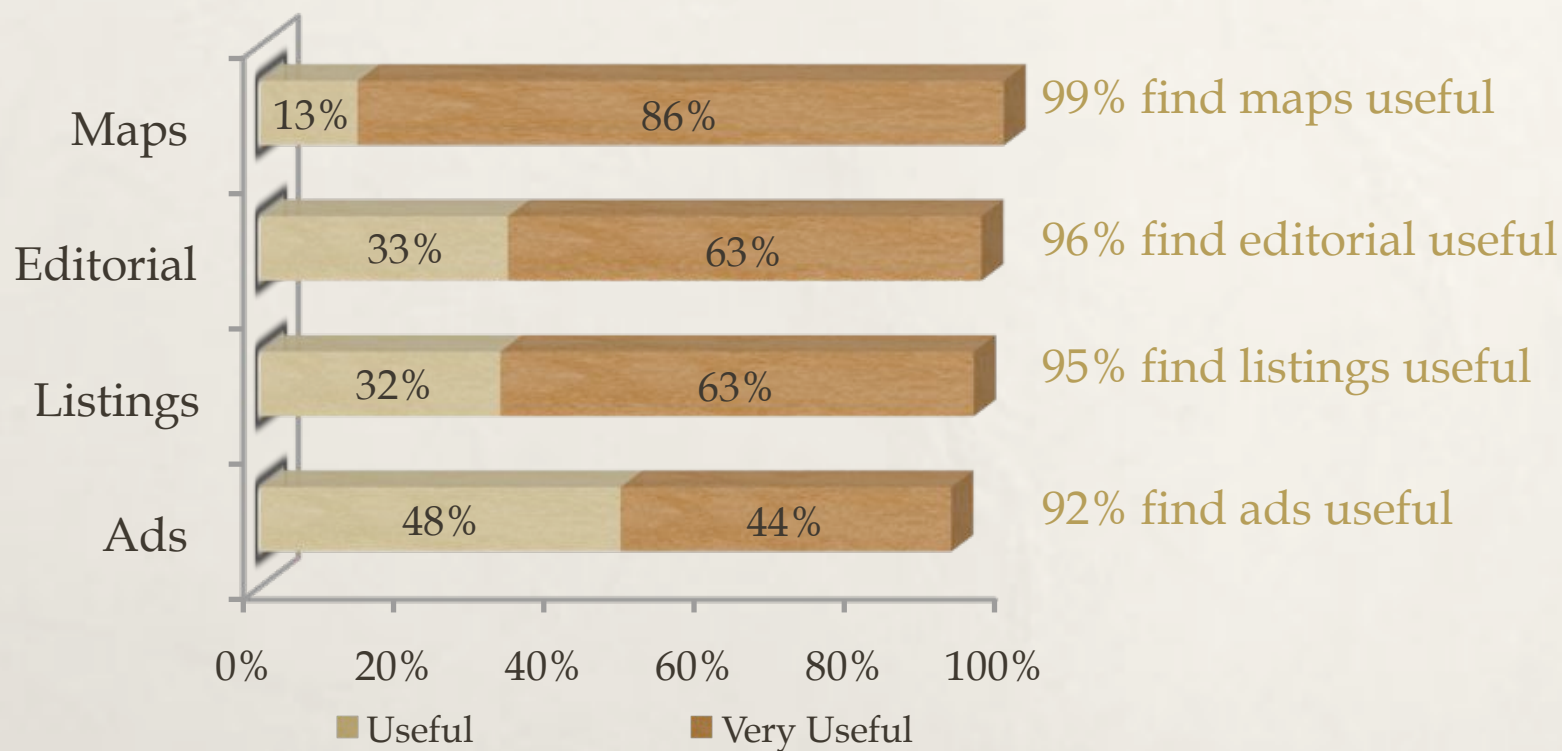
Including yourself, how many people used the Wyoming Official Travelers Journal?



Average
2.3 people

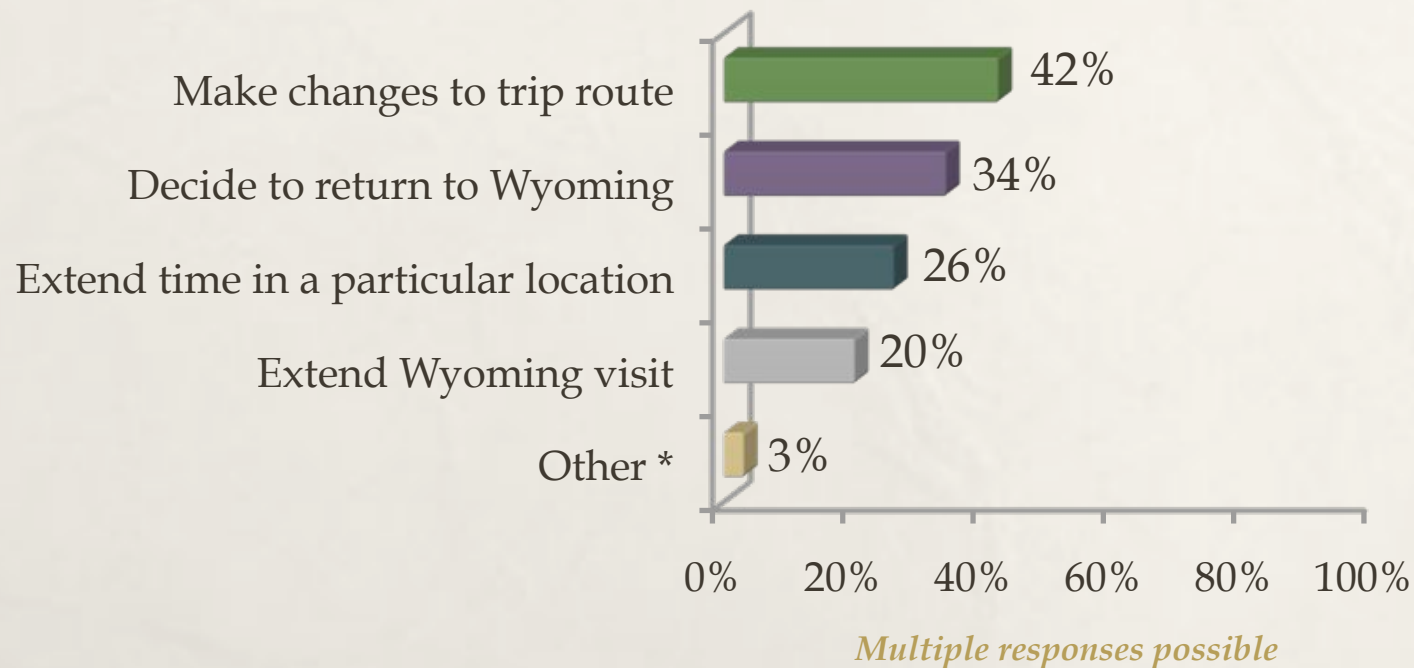
Usefulness of Wyoming Official Travelers Journal

In general, how useful did you find the following items in the Wyoming Official Travelers Journal?



Influence of the Journal

Based on anything you saw or read in the OTJ, did you ...?

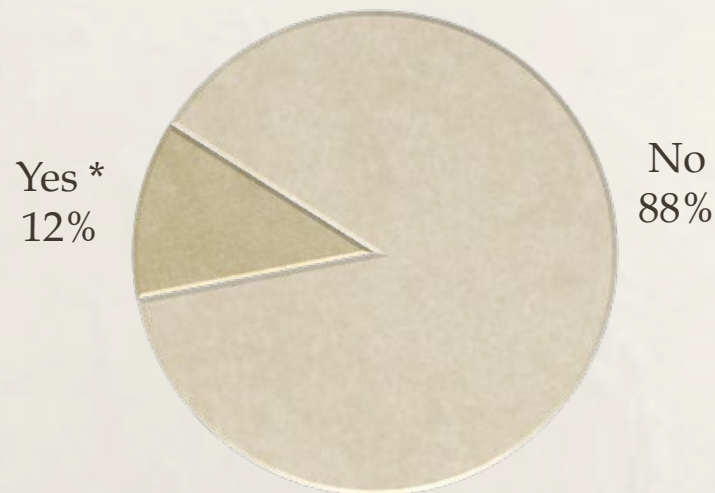


* Other information can be found in the Supplement.

Miles-Weaver Wyoming 2011 OSVG Research
Conducted by A.J. Lerner Market Research

Additional Information

Was there any information missing in the Journal you received that would have helped you better plan your trip to Wyoming?



* Detailed information can be found in the Supplement.

Outdoor Recreation Activities




Highlights: Outdoor Recreation Activities

- ◆ Most (70%) travelers take part in outdoor recreation activities.
 - The most popular activities are: visit a national park (87%), hike or climb (66%) and visit a state park (50%)
- ◆ Over two-thirds (68%) use the Journal to help make decisions about outdoor recreation activities.
- ◆ All parts of the Journal are used to help make decisions about outdoor recreation activities:
 - 43% see an ad
 - 55% use the listings
 - 51% read an article

Outdoor Recreation Activities

In which of the following outdoor recreation activities did you participate?

70% of travelers
participated in
outdoor
recreation
activities



What they did: *

87%	Visit a national park
66%	Hike or climb
50%	Visit a state park
21%	Boat/raft/kayak
20%	Backpack/camp
15%	Fish/hunt
13%	Horseback ride
8%	Other outdoor activity **
6%	Spa/hot spring/wellness treatment
4%	Dude/guest ranch
< 4%	Mountain bike, golf, ski/snowboard

- Asked of all respondents who replied 'yes' to the question "During your most recent visit to Wyoming, did you eat in a restaurant? (n=1,901)


** Other information can be found in Supplement

Multiple responses possible

Outdoor Recreation Activities

Did you use the Wyoming Official Travelers Journal to help you make decisions about outdoor recreation activities?

68% used the Journal to help make decisions about outdoor recreation activities



How the Journal was Used: *

Saw an ad	43%
Used listings	55%
Read an article	51%

Multiple Responses Possible

* Based on those who used the Journal (n=936)

Entertainment and Cultural Attractions



Highlights: Entertainment and Cultural Attractions

- ◆ Most (60%) travelers take part in entertainment and cultural attractions.
 - The most popular attractions are: visit an historic site (77%) and visit a museum (75%)
- ◆ Over three-quarters (77%) use the Journal to help make decisions about entertainment and cultural attractions.
- ◆ All parts of the Journal are used to help make decisions about entertainment and cultural attractions:
 - 53% see an ad
 - 56% use the listings
 - 40% read an article

Entertainment and Cultural Attractions

Which of the following entertainment or cultural attractions did you attend?

60% of travelers
attended
entertainment
and
cultural
attractions



Where they went: *

77%	Historic site
75%	Museum
33%	Sightseeing tour
32%	Native American site
25%	Rodeo
24%	Archaeological site
18%	Festival/fair/farmers market
8%	Performing arts event
7%	Other **

Multiple responses possible


- Asked of all respondents who replied 'yes' to the question "On your visit to Wyoming, did you attend any entertainment or cultural attractions? (n=1,176)

** Other information can be found in Supplement

Entertainment and Cultural Attractions

Did you use the Wyoming Official Travelers Journal in any of the following ways to help you make decisions about entertainment or cultural attractions?

77% used the Journal to help make decisions about entertainment and cultural attractions



How the Journal was Used: *

Saw an ad	53%
Used listings	56%
Read an article	40%

Multiple Responses Possible

* Based on those who used the Journal (n=902)

Dining




Highlights: Dining

- ◆ The vast majority (94%) of travelers go out to eat.
 - They are most likely to eat at a casual/family dining restaurant (95%)
- ◆ 38% use the Journal to help make decisions about dining.
- ◆ All parts of the Journal are used to help make decisions about dining:
 - 63% see an ad
 - 58% use the listings
 - 22% read an article

Dining

During your most recent visit to Wyoming did you eat in a restaurant?

94% of travelers
ate in a
restaurant



Where they ate: *

95% Casual/family dining

48% Fast food

29% Fine dining

Multiple responses possible

- During your most recent visit to Wyoming, did you eat in a restaurant? (n=1,901)

Dining

Did you use the Wyoming Official Travelers Journal to help you make decisions about dining?

38% used the Journal to help make decisions about dining



How the Journal was Used: *

Saw an ad	63%
Used listings	58%
Read an article	22%

Multiple Responses Possible

* Based on those who used the Journal (n=716)

Shopping



Highlights: Shopping

- ◆ A majority (83%) of travelers shop when in Wyoming.
- ◆ 34% use the Journal to help make decisions about shopping.
- ◆ All parts of the Journal are used to help make decisions about dining:
 - 66% see an ad
 - 49% use the listings
 - 27% read an article

Shopping


On your visit to Wyoming, did you shop?

83%
of travelers
shopped

Shopping

Did you use the Wyoming Official Travelers Journal in any of the following ways to help you make decisions about shopping?

34% used the Journal to help make decisions about shopping



How the Journal was Used: *

Saw an ad	66%
Used listings	49%
Read an article	27%

Multiple Responses Possible

* Based on those who used the Journal (n=566)

Lodging




Highlights: Lodging

- ◆ Nearly all (98%) of travelers stay overnight.
 - They are most likely to stay in a hotel/motel (73%) or RV park/campground (25%)
- ◆ 53% use the Journal to help make decisions about lodging.
- ◆ All parts of the Journal are used to help make decisions about lodging:
 - 53% see an ad
 - 64% use the listings
 - 35% read an article

Nights Stayed

During your most recent visit to Wyoming, where did you stay?

98% of travelers
stayed
overnight



Where they stayed: *

- 73% Hotel/motel
- 25% RV park/campground
- 16% B&B/cabin/rental
- 7% Family/friends
- 3% Dude/guest ranch


Multiple responses possible

* Based on those who stayed overnight (n=1,926)

Lodging

Did you use the Wyoming Official Travelers Journal in any of the following ways to help you make decisions about lodging?

53% used the Journal to help make decisions about lodging



How the Journal was Used: *

Saw an ad	53%
Used listings	64%
Read an article	35%

Multiple Responses Possible

* Based on those who used the Journal (n=566)

Use of Other Information Sources

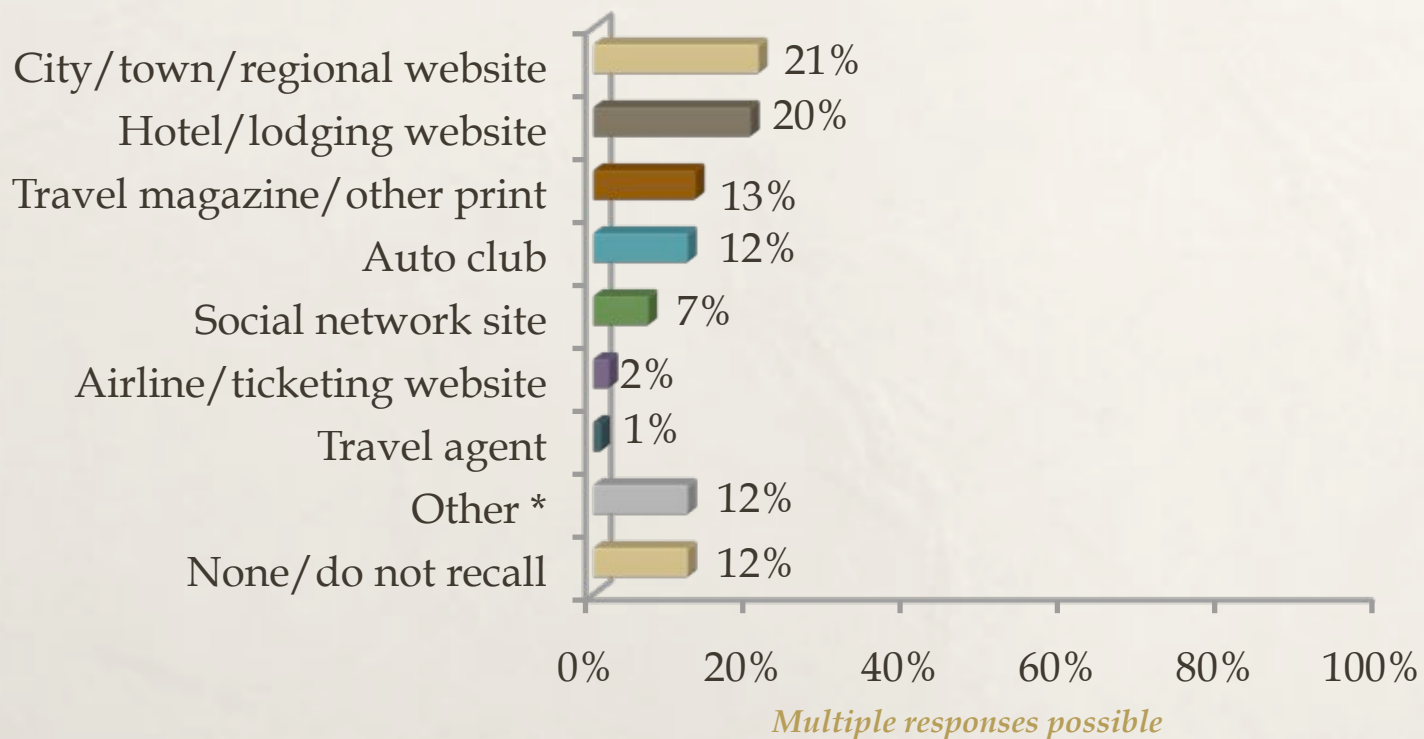


Highlights: Use of Other Information Sources

- ◆ Some Wyoming visitors use other information sources to plan their Wyoming vacation:
 - City/town/regional website (21%)
 - Hotel/lodging website (20%)
- ◆ During their Wyoming visit, travelers use several information sources:
 - Brochure rack/display (61%)
 - Personal computer (48%)
 - Recommendations from lodging provider (39%)
 - GPS (25%)
- ◆ 8% download an electronic Journal.
- ◆ Half (50%) recall seeing or hearing Wyoming advertising:
 - 63% saw a print ad
 - 43% saw an online ad
 - 42% saw a magazine ad

Other Information Sources

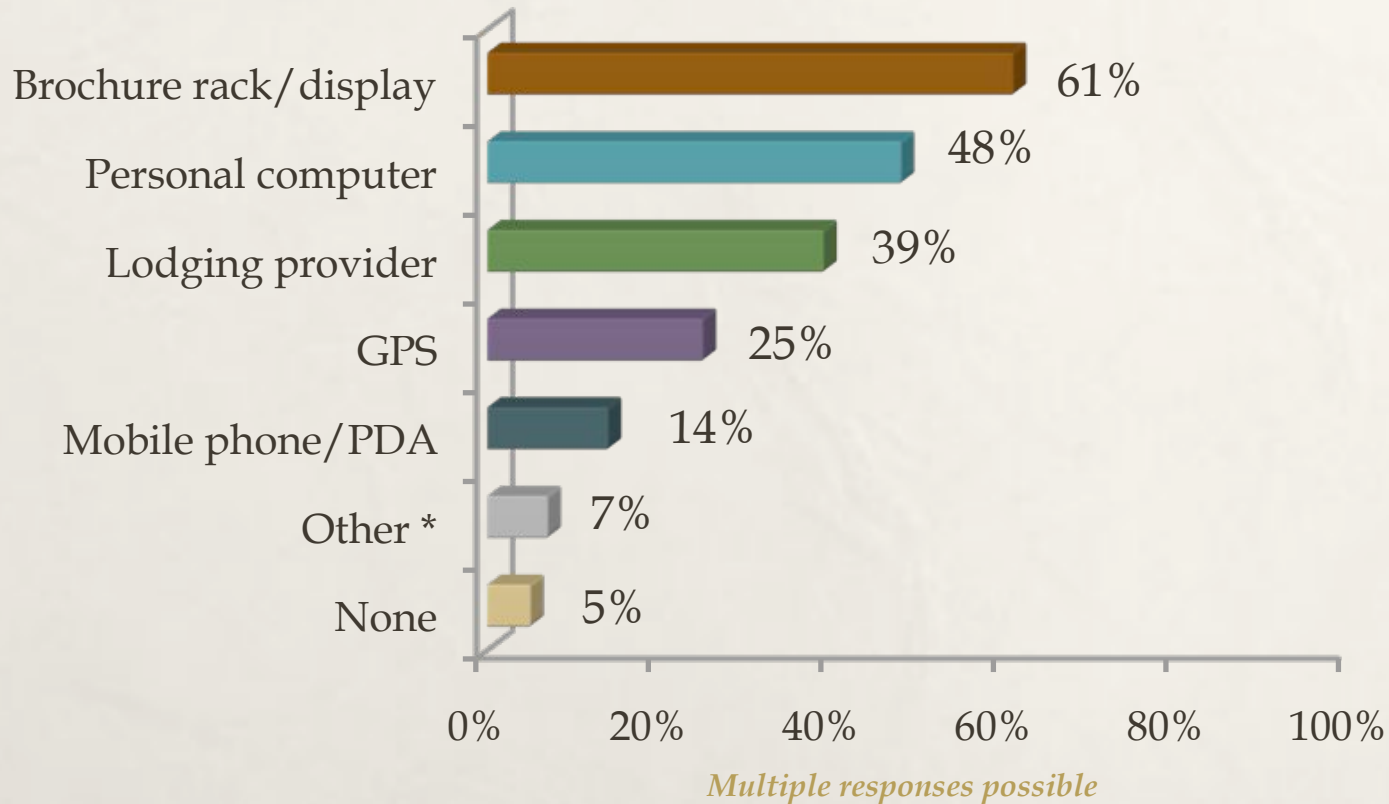
Which of the following other information sources did you use *to plan* your most recent trip to Wyoming?



* Other information can be found in the Supplement.

Information Sources

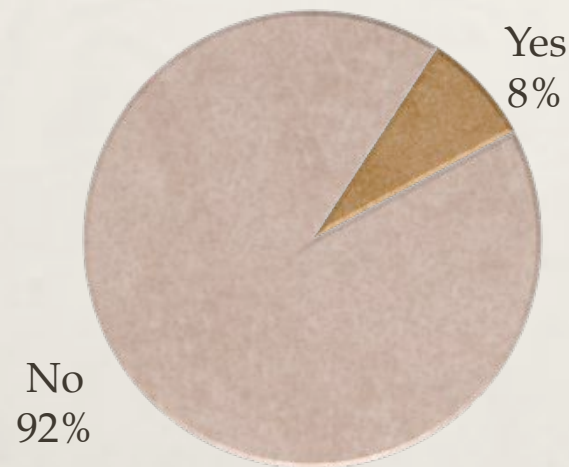
Which of the following information sources did you use during your most recent trip in Wyoming?



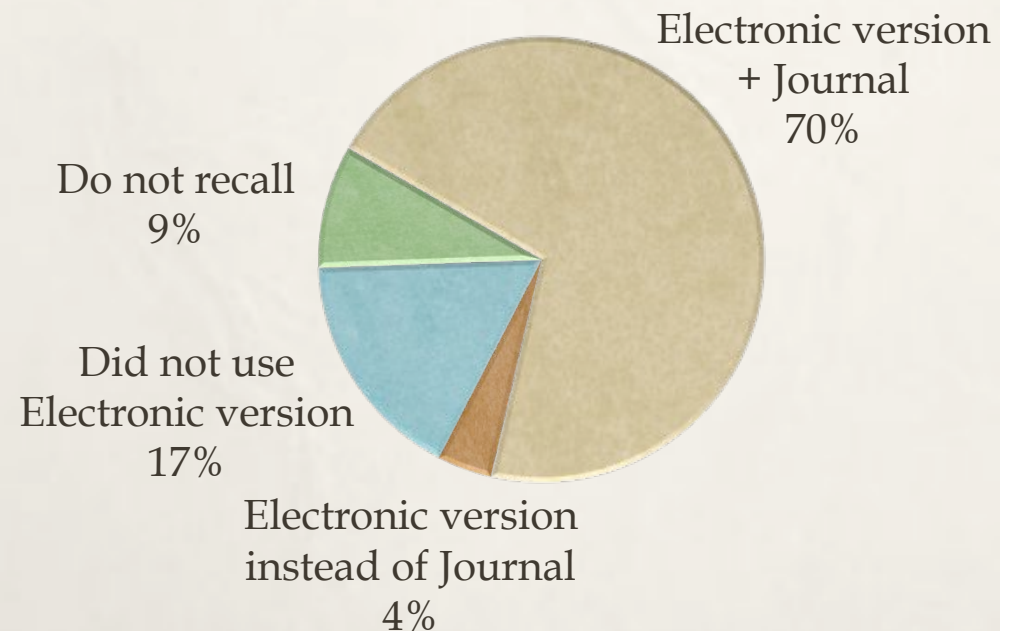
* Other information can be found in the Supplement.

Electronic Journal

Did you download an electronic version of the Wyoming Official Travelers Journal?



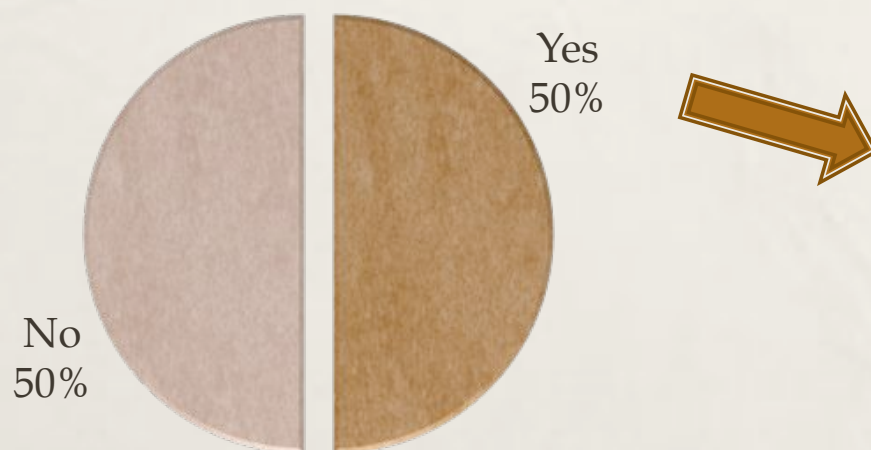
When planning your most recent trip to Wyoming, how did you use the electronic OTJ? *



* Asked of all respondents who replied 'yes' to the question "Did you download an electronic version of the Wyoming OTJ?" (n=164)

Advertising

In the past 6 months, do you recall seeing or hearing any advertising about visiting Wyoming?



Type of Ad	
Television	49%
Online	43%
Magazine	42%
Newspaper	10%
Other *	5%
Radio	3%

Multiple responses possible

* Other information can be found in the Supplement.

Demographics

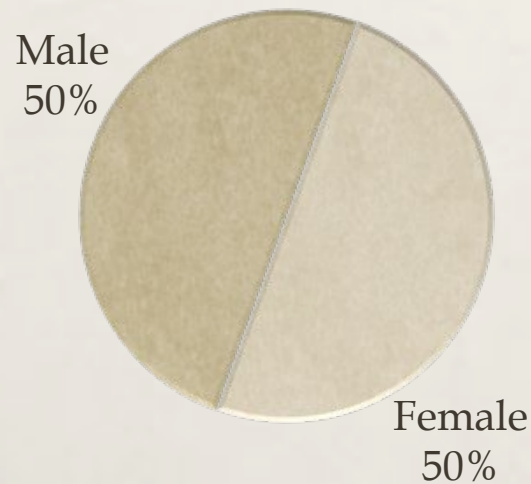


Highlights: Demographics

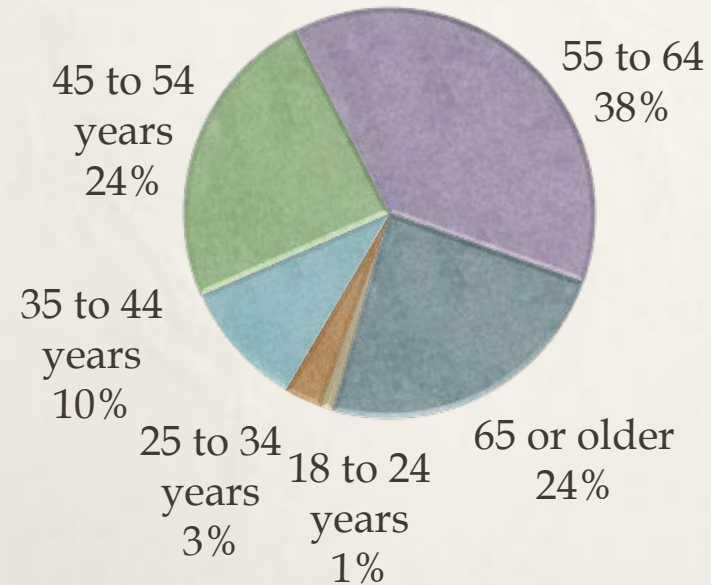
- ◆ Visitors are:
 - Equally male and female
 - 62% 45 to 64 years old
 - 83% married
 - 81% no children at home
 - 55% employed
 - 59% college grads or greater
 - 49% earn \$75,000 a year or greater
 - 99% live in a U.S. state other than Wyoming
 - 55% have taken four or more overnight trips in the last 12 months
 - * For 70%, the majority (75 to 100%) of those trips were for recreation/pleasure.

Demographics

Gender

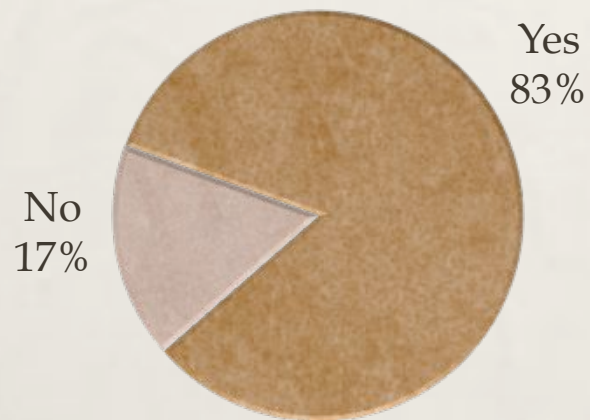


Age

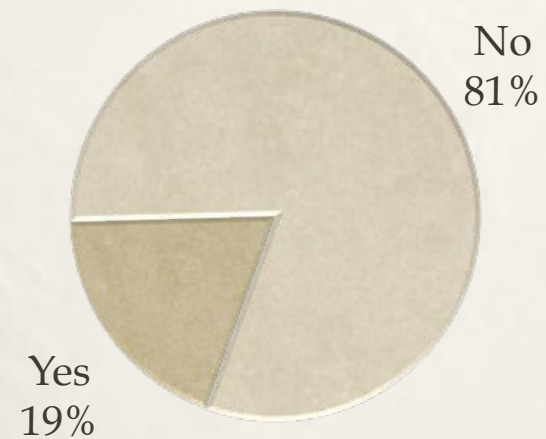


Demographics

Marital Status

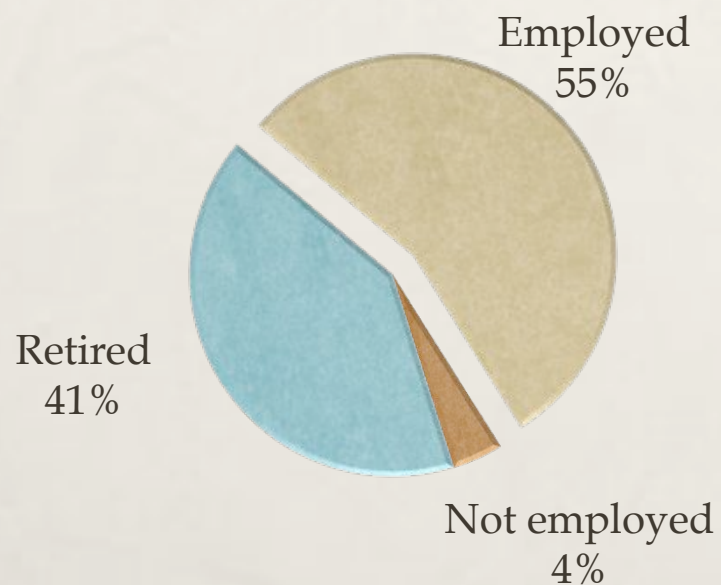


Children at Home



Demographics

Employment

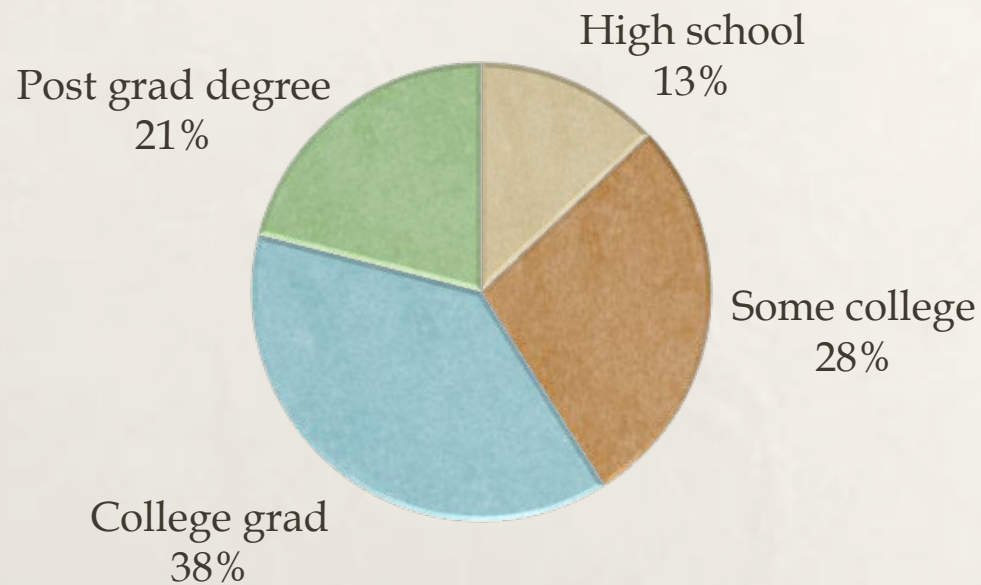


Employment

Full time	86%
Part time	14%

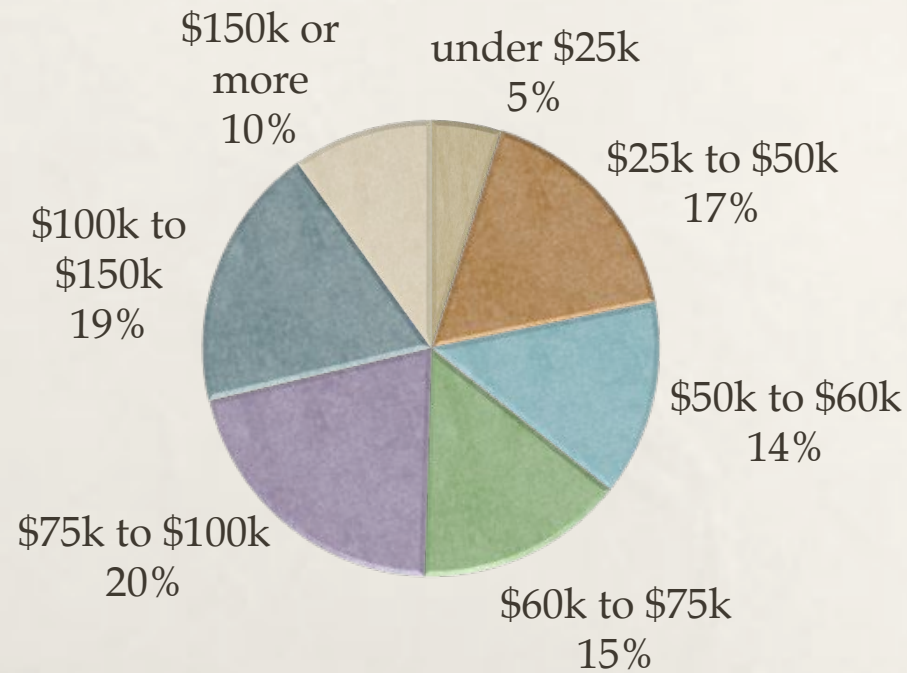
Demographics

Education



Demographics

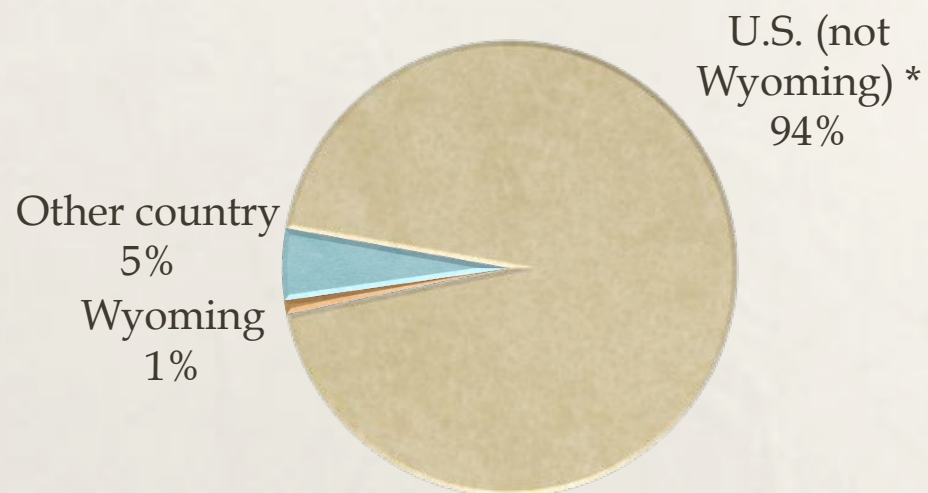
Household Income *



* n=1,811

Demographics

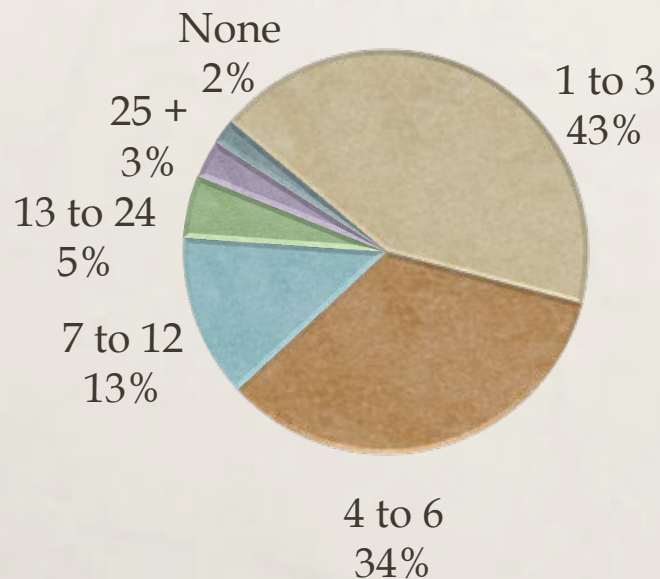
Residence



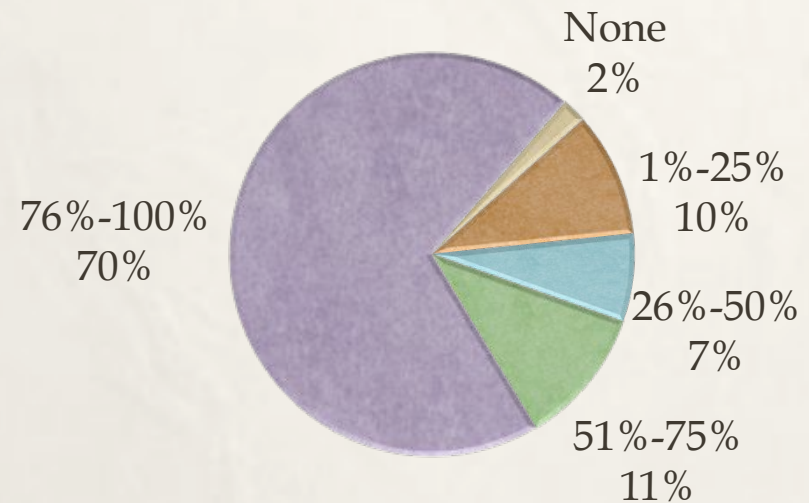
* Detail can be found in Supplement.

Demographics

Trips in Last 12 Months



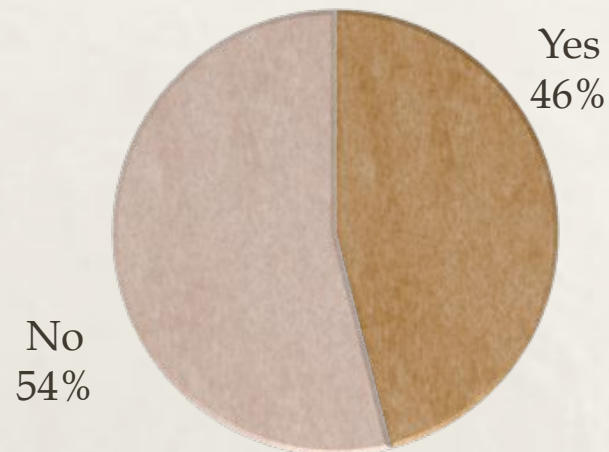
Trips for recreation/pleasure



Addendum

Requesting the Journal

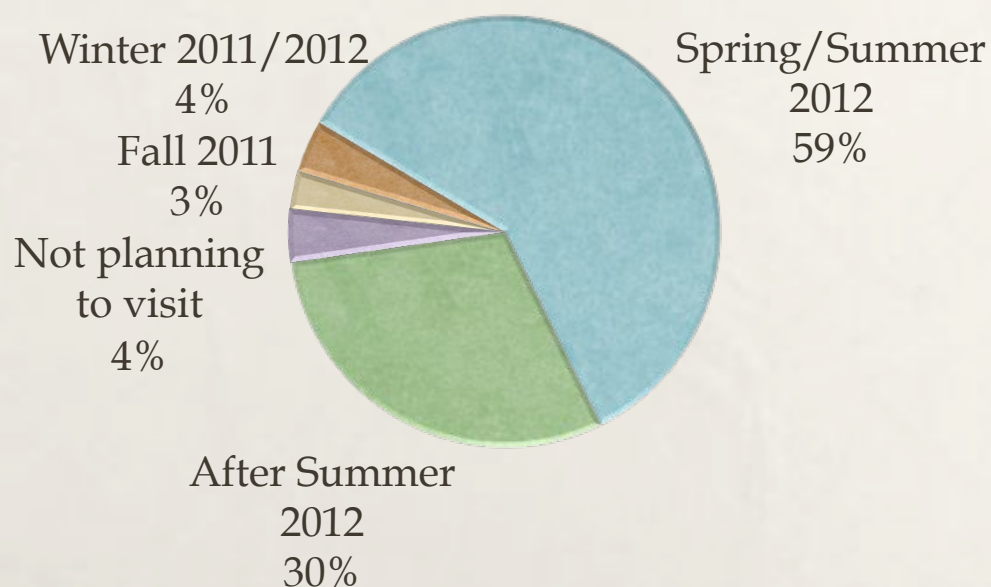
Do you recall requesting a copy of the Wyoming Official Travelers Journal? *



- Asked of those who said 'no' or 'do not recall' to the question, "Do you recall receiving a copy of the Wyoming Official Travelers Journal?" (n = 650)

When They Plan to Visit

When are you planning to visit Wyoming? *



* Asked of those who said 'no' question 'Since ordering the Wyoming Official Travelers Journal, have you visited Wyoming?' (n = 1,143)

Miles-Weaver Wyoming 2011 OSVG Research
Conducted by A.J. Lerner Market Research